

**REQUEST TO TRANSFER IRA OR COVERDELL EDUCATION SAVINGS ACCOUNT (ESA) FUNDS
TO AN ALLIANT CREDIT UNION IRA OR COVERDELL ESA****Section I:** Alliant member, please complete Section I and **Mail Completed Form to the Financial Institution** from which funds will be transferred.

Name of financial institution where funds are currently on deposit

Account number(s)

Street address

Name on account

City, State, Zip Code

Country

Withdraw:☐ All funds immediately or on _____ (Date) and close my account.☐ \$ _____ immediately or on _____ (Date)**Check one box only:**

- A. ☐ Direct Transfer from Traditional IRA to Traditional IRA
B. ☐ Direct Transfer from Roth IRA to Roth IRA
C. ☐ Direct Transfer from SEP IRA to SEP IRA
D. ☐ Direct Transfer from Coverdell ESA to Coverdell ESA
E. ☐ Direct Transfer from Beneficiary IRA to Beneficiary IRA

This serves as my authorization to convert IRA/ESA funds being held in my name to cash as indicated and to initiate a direct transfer to Alliant Credit Union.

Member's signature

Date

Section II: Instructions to current IRA/ESA Custodian/Trustee Financial Institution.Make check payable to: **Alliant Credit Union, FBO (For Benefit Of)**

Member's name ~

Alliant Credit Union IRA account number ~

Return a copy of this form along with the transfer check to:

Via Regular Mail:Alliant Credit Union
ATTN: Special Services
PO Box 66945
Chicago, IL 60666-0945**Via Overnight Mail:**Alliant Credit Union
ATTN: Special Services
11545 W. Touhy Ave.
Chicago, IL 60666-0945
800-328-1935**Section III: Current Custodian, please complete Section III if individual is over age 70½ and return to Alliant Credit Union with check.**

Required (age 70½) Traditional IRA Distribution election information:

Distribution has been made for current year ☐ YES ☐ NO**If yes, please complete below:**☐ Term Certain _____ (number of years)☐ Uniform Distribution Table used for life expectancy☐ Distribution - Joint Life with spouse 10 or more years younger

Spouse is the only primary beneficiary

Name of spouse beneficiary for joint life expectancy only.

Date of birth

Alliant Credit Union accepts appointment as successor custodian of the IRA/ESA funds for the above account.Supervisor, Operations
Account and Special Services**Federally insured by
NCUA**